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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

RECEIVED
1927
U. S. DEPT. OF AGRICULTURE
April 23, 1927.

F.S.
H-12

FOREIGN NEWS ON HOPS

ENGLISH HOP ACREAGE TO BE REDUCED

The members of the English Hop Growers Association have been requested to limit their hop acreage for the current season by 20 per cent because of the large supplies in the hands of the organization, according to a report from Alfred Nutting of the American Consulate General's office at London. Last year a similar request was made for a ten per cent reduction which was carried out either by the non-cropping system or by grubbing the hop plants. The organization points out the necessity of having all members agree to the curtailment and demands that at least 90 per cent of the members agree to the cut. According to the "Manchester Guardian" of April 6, a total reduction of 4,805 acres has been promised by members and non-members of the Association, and a canvass is still proceeding for a further reduction. In 1926 the English hop acreage was officially estimated at 25,600 acres.

English Hop Growers, Limited, was established under the auspices of the National Farmers Union, at the termination of the British Hop Control which was in effect during the war and post-war years. The object of the organization was to stabilize the industry and to place it on an economic basis. The association deals with 90 per cent of the hops produced in England and undoubtedly saved the market from going to pieces last year, according to Mr. Nutting. It is reported to have conducted sales amounting to over \$9,700,000, secured a sufficient advance in prices to cover the cost of carrying stocks through a particularly trying period and returned growers about 1-1/4 per cent on their sale figures. Stocks in the hands of the organization are roughly estimated at 22,000,000 pounds or 4/5 of a normal crop, according to "The Times" of March 21, 1927.

The United Kingdom is one of the most important consumers of American hops. Total imports into the United Kingdom declined, however, in 1925-26, when on August 1, 1925 a duty of 14 sterling per hundred weight (about 17 cents per pound) went into effect. Total hops imported by the United Kingdom declined from 10,063,800 pounds during the crop year September-August 1924-25 to 4,895,600 pounds during the same period in 1925-26. Of this amount the United States supplied 84 per cent in 1924-25 and 85 per cent in 1925-26. From the following table it will be seen that imports from the United States for the 6 months beginning September 1, 1926 are slightly above those of the previous year for the same period of time.

United Kingdom's imports of hops from the United States, September -
February 1924-25 to 1926-27 and total for seasons 1924-25
and 1925-26

| Month | 1924-25 | 1925-26 | 1926-27 |
|--------------------|---------------|---------------|---------------|
| | <u>Pounds</u> | <u>Pounds</u> | <u>Pounds</u> |
| September | 178,500 | 333,800 | 61,400 |
| October | 111,600 | 117,400 | 82,100 |
| November | 80,200 | 349,600 | 258,900 |
| December | 261,100 | 696,400 | 1,023,100 |
| January | 422,900 | 426,600 | 898,600 |
| February | 502,500 | 889,500 | 1,277,200 |
| Total for 6 months | 1,556,800 | 2,813,300 | 3,601,300 |
| Total for year : | | | |
| September-August | 8,416,600 | 4,161,800 | --- |

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H-13

May 27, 1927.

FOREIGN NEWS ON HOPS

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WORLD HOP ACREAGE

The firm of Coninck van Noyen, hop merchants at Alost, Belgium, estimate the 1927 world hops acreage at 141,695 acres. It is estimated that only about 125,000 acres of this will be harvested, however, as a result of damage to the European crop caused by two successive wet winters, and attacks from downy mildew. Reports from Belgium, Germany, Czechoslovakia and Yugoslavia indicate the appearance of peronospora (mildew) while the red spider and aphid fly have appeared in the Belgian hop-growing districts, according to Coninck van Noyen.

The report does not give the acreage harvested in 1926, but according to official statistics reported to the United States Department of Agriculture, together with rough estimates received from other sources, the world hops acreage fell from 121,000 acres in 1925 to 119,000 acres in 1926 as compared with an average of 107,000 acres for the five years, 1921-1925.

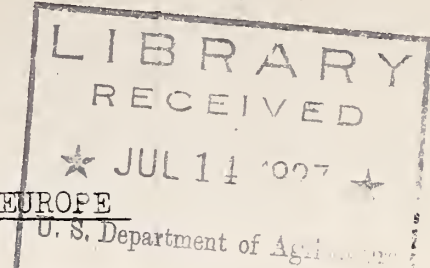
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F.S.
H-14

July 9, 1927.

FOREIGN NEWS ON HOPS

THE HOPS OUTLOOK IN CONTINENTAL EUROPE



An increase in the acreage devoted to hop production in 1927 in practically all hop producing countries in Continental Europe is indicated in reports from the growing districts, although no estimates of the acreage are yet available, according to a report to the United States Department of Agriculture from Agricultural Commissioner G. C. Haas at Berlin. The development of the hop plants has been delayed nearly everywhere by the unusually cool and rainy weather so far this spring, and there has been some damage from "Peronospera humili", particularly in Germany, but the crop outlook generally is considered not unfavorable, as there has been a considerable improvement with the better weather since the first part of June. Conditions, moreover, are considered favorable for good progress with the warmer weather expected to prevail from now on.

The expectation that the 1926 hop crop would only about cover requirements for the season has proved to be the case, as stocks in the hands of the farmers and dealers are reported to be small everywhere. The market, however, is very quiet with little business being done and prices showing something of a weakening tendency, a situation that hop growers' associations and some members of the trade appear to be at a loss to understand, in view of the shortness of the stocks. Some reports state that brewers will have to come into the market again before the new crop is available, but others suggest that brewers, anticipating a shortage, may have covered their requirements earlier in the season. The opinion is also expressed, in explanation of the quiet market, that brewers have used lower grades of hops to a considerable extent, and that beer consumption has also decreased during the second quarter of 1927 as a result of the comparatively cool spring.

Germany

The 1927 acreage of hops in Germany is privately estimated as somewhat larger than in 1926. Up to the early part of June the development of the hop plant was below normal, as a consequence of cool weather and night frosts during May, but the condition of the plant is said to be sound and recent reports indicate improvement with warmer weather prevailing since the first part of the month. "Peronospera humili", which last year did heavy damage to the German hop crop, is apparently less serious this year, partially as a result of energetic measures to control it with fungicides. The yield of this year's crop, however, will depend to a considerable degree upon the extent of damage from this cause.

Stocks of hops in the hands of the farmers and the trade in Germany, according to trade reports, are very small, much smaller than in any recent years, some figures placing trade stocks at only 1,650,000 pounds. Brewers' stocks are also said to be small, but this has not been confirmed. In any event, the carryover of the old crop, if any, will be almost negligible. There has been very little business in the Nürnberg hop market in recent weeks.

It should also be noted in the case of Germany that imports of hops this year have been comparatively large, amounting to 16,314,000 pounds in the 8 months September-April, as compared with 11,905,000 pounds in the same period of the previous season, an increase almost sufficient to make up the difference between the 1925 and 1926 crops, which were estimated by the trade as 14,330,000 pounds in 1925 and about 8,500,000 in 1926. The official estimates of these crops (10,538,000 pounds in 1925 as compared with 5,562,000 pounds in 1926) are materially lower than trade estimates.

Czechoslovakia

A fairly important increase in the Czechoslovakian hop acreage is indicated for this year, some reports estimating as much as 18 per cent. This figure, however, is probably somewhat high. The growth of the plants, as in Germany, has been hindered by the unfavorable weather this spring, and considerable variation is indicated, with healthy development in some sections, but a less favorable condition in others. The low temperatures experienced during May and some dryness at the end of the month, were probably more felt in Czechoslovakia than in Germany, but plentiful rains have since fallen, and the weather has also been warmer, with consequent improvement in plant growth. The condition in the middle of June was said to be good on about one-third of the sown area, and average or below on the remainder. Some damage from insects and "Peronospera humili" is reported, but it is less important than in Germany.

Stocks of hops are very small, and the Czechoslovakian hop market is reported quiet.

Yugoslavia

In Yugoslavia, where the hop acreage has been increasing steadily from year to year, a further increase for 1927 is also reported. With favorable weather from now on, the crop is expected to be good, the plants having improved considerably, as a result of warmer weather during June. Some damage from "Peronospera humili" and insects is reported, but it is not unusual in extent. Stocks of hops are said to be small.

France and Belgium

The hop acreage in France this year is privately estimated at about 5 per cent larger on the whole than in 1926. In Alsace, however, the increase is expected to be 10 per cent or more. The condition of the crop in Alsace at the end of May was about normal, although there had been some damage from weather and diseases. In Belgium the condition of the hops plants was good up to about the middle of June with no unusual difficulties from insect pests, aphids or mildew, according to trade reports.

CONDITION OF HOPS IN GREAT BRITAIN

A trade report from England states that while the hop plants in Kent, the most important hop region of England, started satisfactorily this year and progress made to date is up to the average, there has been considerable trouble from attacks of the aphids. This has necessitated vigorous washing in nearly all gardens and the feeling is that it is not likely to be kept down under the present weather conditions except at great cost.

The imports of hops into the United Kingdom from the United States during the first nine months of the present season were on a considerably higher level than in 1925-26 but were not as large as in 1924-25, the last season prior to the establishment of the present British duty on hops.

UNITED KINGDOM: Imports of hops from the United States, September-May 1924-25 to 1926-27 and total for seasons 1924-25 and 1925-26

| Month | 1924-25 | 1925-26 | 1926-27 |
|--------------------|---------------|---------------|---------------|
| | <u>Pounds</u> | <u>Pounds</u> | <u>Pounds</u> |
| September | 178,500 | 333,800 | 61,400 |
| October | 111,600 | 117,400 | 82,100 |
| November | 80,200 | 349,600 | 258,900 |
| December | 261,100 | 696,400 | 1,023,100 |
| January | 422,900 | 426,600 | 898,600 |
| February | 502,500 | 889,500 | 1,277,200 |
| March | 949,760 | 179,424 | 512,176 |
| April | 1,117,200 | 453,712 | 172,592 |
| May | 1,910,944 | 110,320 | 153,552 |
| Total for 9 months | 5,534,704 | 3,556,756 | 4,439,620 |
| Total for year | | | |
| September-August: | 8,416,600 | 4,161,800 | --- |

Source: Trade & Navigation of the United Kingdom.

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Washington

F.S.
H-15

October 11, 1927

FOREIGN NEWS ON HOPS

PROSPECTS FOR HOPS

Very little information has been received in regard to the size of the world hops crop for the current year. Judging from reports received to date, however, the total crops of England, Belgium and Canada, which enter into direct competition with United States hops, will probably fall below that of last year while the crop in Continental Europe aside from Belgium gives promise of being a heavy one.

Belgium expects a crop 564,000 pounds below last year's crop of 5,012,000 pounds, while England's crop is estimated to be from two-thirds to three-fourths of last year when 37,184,000 were harvested. These decreases, however, are partly offset by an indicated increase of over 100 per cent in the Canadian crop. In regard to the reduction in the English crop, a trade report states that with a crop two-thirds of that of last year, the quantity will be sufficient to meet the needs of the brewers as a substantial surplus is still available from the crops of 1925 and 1926. In view of the large Canadian crop it is quite likely that imports of American hops, which have amounted to about 3,000,000 pounds annually during recent years, will show a decline.

Based on September 1 conditions, the United States hop crop is estimated at 31,800,000 pounds from an acreage of 23,100 acres as compared with 29,428,000 produced from 20,800 acres in 1926. Increased acreages are indicated in Czechoslovakia, Germany and Yugoslavia. In Czechoslovakia the acreage devoted to hops has increased from 30,398 acres in 1926 to 39,000 acres reported for 1927, the acreage harvested last year was 25,911 acres. An early trade report stated that a crop of excellent quality was expected this year. Hops produced in Czechoslovakia are of a very choice type quite unlike those produced in Northern Europe, Canada and the United States, and do not enter into direct competition with these countries on the world market.

Statistics received to date on acreage and production of hops for the current year are as follows:

HOPS: Acreage and Production in countries reporting,
1926 and 1927

| Country | Acres | | Production | |
|---------------------|------------------|------------------|--------------|-----------------|
| | 1926 | 1927 | 1926 | 1927 |
| | Acres | Acres | 1,000 pounds | 1,000 pounds |
| United States | 20,800 | 23,100 | 29,428 | 31,800 |
| Canada | 594 | <u>a/</u> 1,500 | 966 | <u>a/</u> 2,000 |
| Belgium | 3,501 | 3,323 | 5,012 | 4,448 |
| England | 25,599 | <u>b/</u> 23,030 | 37,114 | --- |
| Czechoslovakia ... | <u>c/</u> 25,911 | | 18,686 | |
| | <u>d/</u> 30,398 | 39,000 | | |

a/ Commercial estimate. b/ In 1927 hop growers were notified that "Land planted with hops should only be returned under hops if it is proposed to pick a crop of hops this season". c/ Acreage harvested. d/ Acreage sown.

England

The outlook in England is for a hops production below that of last year, according to British Trade reports. The decrease from last year is not only due to a reduced acreage from last year but also to an expected low yield because of unfavorable weather conditions throughout the growing season. The acreage reported for this year is 2,600 acres below that of 1926, however the actual difference is not so large since in reporting the acreage for 1927 the hop growers were instructed to report only the acreage which they intend to pick. Last year's acreage was reported as acreage under hops and probably includes areas which were not actually picked.

Hop picking began in Kent the week of August 29 which was earlier than was first expected as the burr was slow in developing due to the unfavorable weather conditions. In normal years the hops are well developed by the middle of August, this year, however, in many places the burr was just beginning to form at that time. There appears to be considerable unevenness in the development of the hops. The Tutsham variety which is extensively grown is particularly backward, bramblings and fuggles are more forward and seem likely to yield fairly well. Trade reports of September 5 and 15 bear out early reports of a light crop, but state that the growers find the crop riper than expected and except where affected by mold or downy mildew, the hops are of a good color and while below vintage standard appear to possess good brewing qualities.

Early reports in regard to the prevalence of mold appear to be exaggerated. At a meeting of hops growers at Canterbury it was stated that there was less mold than last year and there was no occasion for worry on that score.

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No estimate has been made as to the size of the crop. In normal seasons it is possible in the second week of August to give an estimate of the probable yield, one of the chief difficulties met with in attempting to forecast this year's yield in any area arises from the slow development of the burr. The general opinion of the trade points towards a crop from two-thirds to three-fourths of that of last year.

Canada

A commercial estimate places the 1927 hops production in British Columbia at 2,000,000 pounds or more than double last year's crop which was officially estimated at 966,438 pounds. This year's increase is due to the fact that an acreage approximately equal to the total acreage previously under hops comes into bearing for the first time in 1927, according to a trade report. The Canadian crop is grown entirely in British Columbia. Up to the year 1925 the acreage devoted to hops in Canada had remained practically stationary over a period of years. In 1925 the Government of British Columbia put on the market a thousand acres of land suitable for hop cultivation in the reclaimed area of the Sumas district, which lies just across the boundary line from the town of Sumas in the state of Washington. This land has gradually been taken up and planted very largely by hop growers of experience from the United States Pacific Coast, according to the report.

The greater consumption of hops and increasing demand from brewers in Eastern Canada is responsible for the interest in hop cultivation in British Columbia. The industry has in the past been able to supply but little more than one-third of the hops used in domestic manufacturing, owing to its engagement at the same time in an export trade. To support the large and growing brewery industry of Canada, very substantial importations have been necessary. These have come in the main from the United States.

Yugoslavia

The prospects for the 1927 hops production in Yugoslavia are satisfactory, according to a report from Stewart E. McMillin at Belgrade. No estimate as to the size of the crop has been made, in regard to quality, Consul McMillin states that about 20 per cent will be classified as good, 30 per cent as fairly good, 30 per cent as average and 20 per cent as poor. Yugoslavia produces a type of hops similar to that of Czechoslovakia. The culture of hops is a comparatively new industry in Yugoslavia but it is steadily developing and spreading and has become of considerable importance as an export commodity. In 1925 hops exports ranked third in value being exceeded only by wheat and corn, according to a report of the Chamber of Commerce in Novi Sad.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

F.S.
H-16

November 2, 1927

FOREIGN NEWS ON HOPS

BRITISH HOP SITUATION

The Ministry of Agriculture of Great Britain estimates the British hops production for the current year at 28,616,000 pounds from an acreage of 23,004 acres, according to a cablegram to the United States Department of Agriculture from Agricultural Commissioner E. A. Foley at London. This indicates a decrease in production of 23 per cent as compared with last year when 37,184,000 pounds were harvested from an acreage of 25,600 acres. A yield of 1,244 pounds to the acre is reported for this year as compared with 1,453 pounds to the acre for 1926 and 1,514 for 1925.

According to trade reports there are still large supplies of hops on hand in England carried over from the two last years; with this year's low crop it is expected that most of these supplies will be absorbed, leaving a small carryover at the end of the season.

During September of this year 266,784 pounds of hops were imported as compared with 93,520 in September 1926 and 395,808 in 1925. The United States continues to be the most important source of foreign hops in the United Kingdom. During the month of September, the United States supplied 177,408 pounds in 1927, 61,376 in 1926 and 333,760 in September 1925. Imports of hops into the United Kingdom during the crop year September 1-August 31, 1926-27 show an increase of over 900,000 pounds above imports during the same period in 1925-26, but they are only a little over half as large as the imports during the same period in 1924-25 when the low tariff was in effect.

The following table gives acreage and production of hops in England during recent years, and imports of hops into the United Kingdom for the period September 1-August 31, 1924-25 to 1926-27:

| Year | Acreage | Production | Year ending August 31 | Imports | | |
|------|--------------|---------------|--------------------------------|------------------------------|----------------------------|---------------|
| | | | | From the United States | From other countries | Total |
| | | | | | | |
| | <u>Acres</u> | 1,000 | | 1,000 | 1,000 | 1,000 |
| | | <u>Pounds</u> | | <u>Pounds</u> | <u>Pounds</u> | <u>Pounds</u> |
| 1924 | 25,897 | 49,841 | | | | |
| 1925 | 26,256 | 39,760 | 1924-25 | 8,417 | 1,647 | 10,064 |
| 1926 | 25,600 | 37,184 | 1925-26 | 4,162 | 734 | 4,896 |
| 1927 | 23,004 | 28,616 | 1926-27 | 4,726 | 1,085 | 5,811 |

